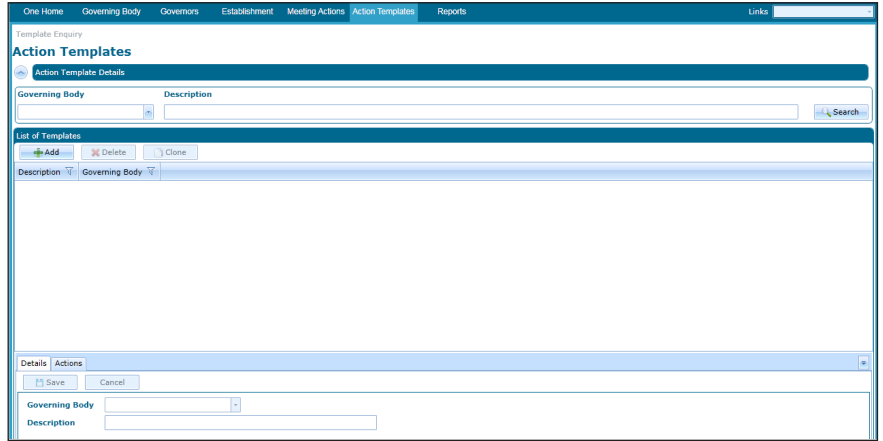




### Managing Templates

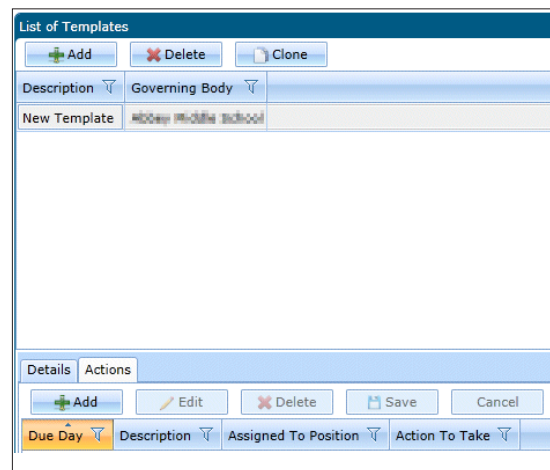
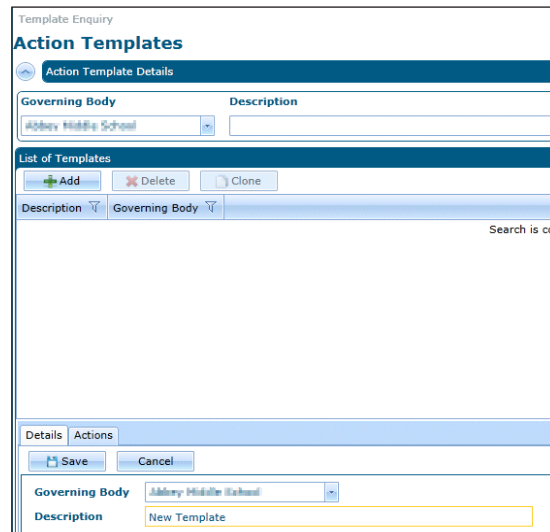
1. To manage a template of meeting actions, click the **Action Templates** button on the primary navigation bar to display the **Action Templates** page.
2. Enter search criteria and click the **Search** button to display matching templates in the **List of Templates**.
3. To add a new template of actions, click the **Add** button. Proceed to **Adding a Template**.
4. To clone an existing template, highlight it then click the **Clone** button. Proceed to **Cloning a Template**.
5. To delete a template, highlight it then click the **Delete** button.



### Adding a Template

Clicking the **Add** button on the **Action Templates** page enables you to add details of a new template.

1. Click the **Details** sub-tab at the bottom of the page.
2. Select a **Governing Body** (if required) and enter a **Description** for the template.
3. Click the **Save** button.
4. Click the **Actions** sub-tab at the bottom of the page.
5. Click the **Add** button to display the **Template Action | Add** dialog.





6. To add a new template action:
  - a. Select a **Due Day**. This is the number of days relative to the meeting date that the action is due to be completed. It can be a negative number if it is prior to the meeting
  - b. Enter a **Description** for the action.
  - c. Enter **Action to Take**, if required.
  - d. Select an **Assigned to Position**.
7. Click the **OK** button to display the **Action Templates** page.
8. Click the **Save** button.

### Cloning a Template

Clicking the **Clone** button on the **Action Templates** page creates a new template with the same details as the selected template. The details can then be updated.

1. Click the **Details** sub-tab at the bottom of the page.
2. Select a different **Governing Body** (if required) and enter a **Description** for the new template.
3. Click the **Save** button to save the details.
4. Click the **Actions** sub-tab to update the meeting actions, if required.
5. Click the **Save** button to save the meeting actions.



#### Related Reference Guides:

- [Primary Navigation](#)
- [Manage Meetings](#)
- [Manage Actions](#)